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# Protest in Western militaries

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**abstract** Although military personnel in Western democracies rarely resort to protest tactics, this does not mean that they never experience discontent. In light of the transformation of the military organization in the period following the Cold War, socio-economic pressures on military personnel have intensified. When facing these challenges, military personnel operate within a specific context in which the unique military culture and a specific legal framework often make engaging in protest more difficult than elsewhere in society. This article integrates the literature on the transformation of Western militaries, the unique context of the military organization and the empirical evidence on protest within the military organization. The article assesses the evidence amassed so far, identifies the limitations in the existing research and proposes an encompassing framework for future study of protest within militaries in Western democracies.

**keywords** austerity ♦ grievances ♦ military organizations ♦ protest ♦ trade unions

## Introduction

In Western democracies, military personnel rarely engage in protest, whether political or labour related (Langton, 1984). Luckily so, one could argue – military personnel getting on the barricades in order to achieve political goals has often meant a serious crisis for the democratic order, like in Turkey in 2016 or in Spain a few decades ago. However, even the modes of protest which are widely accepted as legitimate rarely take place within the military. By and large, this is not a voluntary choice. While the severity of the rules differ from country to country, all Western democracies place some kind of legal restrictions on protest behaviour among their military personnel (Nolte, 2003). Additionally, the military remains an organization with a specific organizational culture which makes the route to protest complicated, if not impossible. The motivation behind these restrictions concerns the irreconcilability of protest with military tasks, and, more broadly, the democratic order.

At the same time it is a paradox that those who

defend democracy with their lives do not get to enjoy it to the full (Sugin, 1987). While this might be an interesting theoretical and judicial question, for military personnel there are important practical ramifications. They, just like all other citizens, sometimes face situations which cause discontent. While only a minority of citizens tends to engage in protest, it being even less available to military personnel might make them unusually weak in the face of social and economic challenges.

In this article, we focus on protest by military personnel in Western democracies. Protest itself can take many forms, and can be divided into actions within norms of existing social systems, like petitioning or taking part in a demonstration, and actions which violate the law, like illegal protest or civil disobedience (Wright et al., 1990). It remains important to note that, often, a reaction to discontent implies different kinds of behaviour, such as silence, remaining passive, exiting the situation altogether or even resorting to

anti-social behaviour, as forwarded by Hirschman (1970) and those who built upon his framework. Such forms of behaviour are subject to extensive research, also within the military, but lie largely beyond the scope of this article.

We aim to shed light on the whole process of engaging in protest in the specific context of the military organization. Therefore, we cover the causes of discontent, the restrictions military personnel experience when considering protest and the instances when protest does materialize. To understand these issues we review three strands of literature: (1) military sociology, (2) social movements and trade unions and (3) organizational science, in line with other interdisciplinary studies on the military (e.g. Harries-Jenkins and Moskos, 1981: 3).

Our focus is solely on militaries in Western democracies. While militaries all over the world have a similar *raison d'être* and tend to show a similar organizational culture, when considering the position of military personnel and protest specifically, the differences in context are vast. Importantly, in non-democracies, the rights of all citizens are limited while the lack of democratic institutions and civil society creates a situation profoundly different than in Western societies. Furthermore, the role of the military in non-democracies is different as well, as the concept of civilian leadership is often blurred and the military is commonly employed to protect the authoritarian structures. Subsequently, while just as interesting, we do not address the topic of protest in militaries outside Western democracies.

This article consists of four sections. In the first theoretical section we discuss three key theoretical elements: (1) the origins of discontent in the contemporary Western military organization, (2) the specific context of the military organization and (3) the traditional arrangement for dealing with discontent within this context. In the second, empirical section we review the evidence on protest among military personnel in Western democracies. In the third section we assess the evidence observed so far and identify the limitations in its scope and content. Finally, in the fourth section we propose an encompassing framework for understanding this topic and identify avenues for future research.

## **Theoretical section: From discontent to protest in the military organization**

### *Change and discontent in the Western militaries*

In recent decades, Western military organizations went through a process of profound transformation. This process influenced almost every aspect of the

military organization and resulted in shifts regarding tasks, organizational structure, culture as well as position of personnel.

The literature forwards a number of factors causing this transformation. Arguably the most influential is the changing geopolitical situation. In the period following the Second World War, Western militaries prepared to confront the danger coming from the Soviet Union. Then, rather abruptly, the Cold War ended and the enemy Western militaries were designed to deter disappeared or at least seemed less relevant. Downsizing the military is a common practice at the end of any major conflict – and in that sense, the end of the Cold War was no exception (Wong and McNally, 1994). NATO countries immediately started reducing military spending and planning the downsizing of their militaries (McCalla, 1996), thereby capitalizing on the so-called peace dividend (Intriligator, 1996; Ward and Davis, 1992). Multiple rounds of budget cuts followed, especially in Europe, but early in the 1990s in the United States as well (Brasher, 2000). Aside from budgetary pressures, numerous other factors brought about change as well. Many of these appeared long before the watershed moment of the fall of the Soviet Union. For example, continuous technological advances produced both new possibilities and new adversaries (see Farrell and Terriff, 2002). The introduction of New Public Management since the 1980s has had a dramatic effect on (semi-)governmental organizations. The military did not escape this trend as business-like efficiency practices (Dandeker and Paton, 1997; Heineken, 2006) and market forces (Levy, 2010) increasingly play a role within the organization. Since the Cold War, the role of the private sector 'has grown exponentially and such firms now play a pivotal role in international relations' (Ballard, 2007: 43). Aside from management practices, 'in society, social, cultural and legal changes provide a less robust supporting framework for the core values of military culture' (Dandeker, 2001a: 5). In particular, values of authority and obedience became increasingly challenged after the 1960s (Bartle, 2006b: 212). When Janowitz (1960) first noted the convergence of the military sphere and the civilian mainstream he referred to the relaxation of the strict authoritarian modes of behaviour within the military but also the changes in other practices and rules. For instance, the recruitment of officers became more open and started to resemble recruitment in civilian society. The traditional traits of the military leader such as personal bravery increasingly became replaced by managerial and technological qualities. Furthermore, rising individualism might lead personnel to increasingly defend their own personal interests (Heineken, 2006: 2). New norms

inevitably find their way into the organization itself with the recruitment of new personnel (see Van Schilt [2011] on changing norms among different generations of Dutch officers-to-be) but militaries also experience direct political and societal pressure to adapt to the new norms within broader society, such as for example the rapidly changing public opinion on LGBT rights (see Baunach [2012] on the shift in US public opinion in this regard).

Inevitably, the diverse set of pressures caused numerous and multifaceted changes within many Western military organizations, going far beyond the easily visible process of downsizing. In the 1970s, Charles Moskos (1977) proposed the so-called I/O (institutional/occupational) model in order to describe the social organization of the military and the military profession. Based on the American example, Moskos made a claim that the military was shifting from an institutional towards an occupational model. The core idea of the institutional model is that it is

... legitimated in terms of values and norms, i.e., a purpose transcending individual self-interest in favor of a presumed higher good. Members of an institution are often viewed as following a calling; they generally regard themselves as being different or apart from the broader society and are so regarded by others. ... When grievances are felt, members of an institution do not organize themselves into interest groups. (Moskos, 1977: 42)

Contrasting with the institutional model, Moskos presented the occupational model, as

... legitimated in terms of the marketplace, i.e., prevailing monetary rewards for equivalent competencies. In a modern industrial society employees usually enjoy some voice in the determination of appropriate salary and work conditions. ... The occupational model implies priority of self-interest rather than that of the employing organization. A common form of interest articulation in industrial- and increasingly governmental-occupation is the trade union. (Moskos, 1977: 43)

While elements of both types were present within military organizations, Moskos (1977: 43–44) argued that, traditionally, militaries corresponded more to the institutional than the occupational model and in fact opposed the organizational outcomes of the occupational model. The signs of the shift identified already in the 1970s included restructuring of the benefits towards a market-like system and higher levels of desertion and attrition (Moskos, 1977: 45).

After the end of the Cold War, changes in the military organization intensified (Booth et al., 2001:

320–321). In the 1990s, the I/O model was redeveloped into the postmodern military model. While the term postmodern should be taken with much caution (see Booth et al., 2001), this framework was repeatedly applied to understand the changes in the Western militaries in the post-Cold War period. The postmodern military model presents a typology of three forms of military organization in the 20th century: early modern (roughly until the WWII), late modern (post-WWII) and postmodern (post-Cold War). According to Moskos et al. (2000: 2), five key organizational changes mark the switch towards the postmodern military: (1) increasing contact between the military and the civilian sphere, (2) diminution of differences based on branch of the military, rank and the combat/support roles, (3) the switch from fighting to missions which are traditionally not seen as a military task, (4) the increasing role of international bodies which authorize and govern such missions and (5) the internationalization of military organizations themselves, especially in Europe.

In addition to the broader organizational changes, a number of specific trends directly influenced not only the status but also the very composition of military personnel. Most visibly, at the end of the 20th century, more and more Western democracies opted to end obligatory conscription of their male population and abandon the model of a mass army. In 1997, France, the birthplace of mass conscription, symbolically joined this growing group of countries (see Haltiner, 1998). Furthermore, military organizations increasingly saw greater involvement of civilian employees, full integration of women, removal of the families from the military realm and acceptance of sexual minorities. As stressed by Moskos (1977), in different countries and in different segments of the military organization changes go at a different pace or might not even be visible. Also, the postmodern model is by no means predictive in the sense that it guarantees that the transformation will always go in the predicted, postmodern direction (Moskos et al., 2000), although developments such as the recent acceptance of gays and lesbians within the US military show that turning back the clock is even less realistic, given the social and structural pressures which caused these changes.

While both the I/O model and the postmodern military model focused on the organizational and cultural aspects of the changes, others stressed the economic background of the same process. King (2006) interpreted the transformation of the military organization by employing the concept of economic post-Fordism and its four crucial elements: (1) the move from a mass to a core and peripheral workforce, (2) outsourcing, (3) centralization of

management control and (4) network capitalism. According to King (2006), these four concepts can be used to interpret the developments within the military organization, as both industry and military face similar pressures to which they respond with similar organizational solutions.

Levy (2010) combined both the organizational-cultural elements highlighted in the postmodern military model and the economic elements proposed by King (2006), in a model in which he identified a shift from the *citizen army* towards the *market army*. Within the market army, militarism as a value system is subject to the market and economic calculations. In terms of structure, the organization is becoming post-Fordist. The hierarchy, so typical of the military, shifts from vertical to network-centric. In terms of culture, the military profession increasingly is looking civilian. Military service is becoming commodified instead of being a civic duty. Finally, in terms of labour relations the contractual nature of the profession produces a push towards unionization. And while unionization might still be illegal in some countries, Levy (2010) asserts that the commodification of the profession in the end produces new ways of addressing one's grievances – including protest.

While the models describing the transformation of the military might differ in the way they interpret the background of this process, the actual developments and their consequences for personnel are clear. Those who were declared redundant had to cope within a job market they were not necessarily qualified for, while those who remained faced increased workloads with fewer people and less funding. Privatization and outsourcing changed not only how military operations are conducted but also the military profession itself. For personnel this meant facing an erosion of the traditional elements of the military profession including control over the unique knowledge and skills which used to bring prestige and status to the profession, the autonomy of the professional soldier within the military domain, the loyalty to the chain of command and the group cohesion but also service ethics in which selfless service and not remuneration used to be central (Heinecken, 2014). Widespread introduction of flexible contracts produced uncertainty and discontent among personnel but also an occupational attitude towards the military profession (Soeters et al., 2006). As a result, from a place where the material side of the job was less important and the organization took care of the employee's life and family, the military has become a more civilian-like workplace where personnel are regularly exposed to social and economic pressures (see for instance, Heinecken, 2006).

Interestingly, while the theoretical models which

explain the changes within the military identify the pressures which military personnel face, they also predict more resistance to such developments. Already in 1977, Moskos was arguing that with the shift from the traditional soldier's profession to a more civilian-like occupation, military personnel would look for the same kind of representation and protection as civilians do. At the time, Moskos (1977) also referred to the increased tendency of military personnel to bring grievances to litigation. Especially in cases where the more usual forms of labour activism are not available, seeking judicial protection from measures perceived as unfair can be seen as a form of protest. In the same period, the attempt to unionize US military personnel occurred. This was widely interpreted as a sign of the looming shift towards the occupational model. Notably, while unionization of American military personnel failed to materialize, in many other countries trade unions did gain a foothold within military organizations (see Bartle and Heinecken, 2006). According to Heinecken (2006: 2) the clash between a deteriorating labour position and increasing operational demands causes increased interest in military representation and unionism, a trend partially fostered by the rise of societal individualism. Levy (2010) goes even further and highlights increased activism, not only regarding the socio-economic position of personnel but also the policy regarding the deployment of the military forces.

At the same time, while pressures might call for more activism, it has been noted that the end of conscription might in fact impede protest. Vasquez (2005) argued that collective action aimed at preventing military casualties is more likely to occur in democracies with conscription than in democracies with a volunteer force. Namely, conscription results in more citizens with political power being influenced by the risks of combat, which promotes engagement in activities to curb such risks.

Whether military personnel will indeed become increasingly assertive remains the question. Engaging in protest and activism is by no means an easy process, even in the civilian world, let alone in the military. And while the military might be turning more civilian, most authors agree that military organizations will never become *just another company*. Under pressure or not, military personnel will have to deal with their discontent in a very specific context.

### *Context of the military organization: Working, living and protesting within the military*

Those who write about the military often refer to it as a place that is different from the rest of society. In



understanding the effect of the military context on protest we focus on two important aspects. First, the military environment is unique and vastly influential. Hence, military personnel often find it difficult to operate independently of their organization, even when engaging in activities which are unrelated to the military tasks. Second, a number of typical organizational characteristics have consequences for engaging in protest, usually by suppressing or limiting it.

**Military uniqueness and exceptional impact on individuals.** While most organizations and organized groups in society have their specific cultures and practices, the military is often represented as being a world apart – because of its customs and rules distinct from the mainstream civilian world, its historical persistence and the relatively large number of people who (used to) work within it.

It is well known that soldiers are routinely trained to be different than citizens. Goffman's (1961) theory of 'total institutions' has been widely applied to understand the position of military personnel. They often find themselves within a place 'where a large number of like-situated individuals, cut off from the wider society for an appreciable period of time, together lead an enclosed, formally administered round of life' (Goffman, 1991 [1961]: 11). Many military sub-organizations, army barracks for example, belong to a type of total institution formed to pursue a work-related goal. While many of the military institutions are nowadays semi-total rather than total institutions (Van Schilt, 2011: 32), many characteristics of life within a total institution still apply. For example, all aspects of life conform to institutional rules and regulations while many of the habits and manners typical for the outside world are rejected. The line between private and professional lives is blurred and those who have spent a long time within the military find it difficult to continue life in the civilian world.

Segal (1986) and Soeters et al. (2006) also highlight the great personal impact of military service. The military is, they argue, just like family, a *greedy institution* which takes a high toll on individuals in terms of loyalty, commitment, time and energy. The risks involved in military service, frequent mobility and prolonged stays abroad all make working within the military distinctively different than working elsewhere in society.

While the transformation of the military organization described in the earlier section highlighted a move towards the civilian mainstream, most authors dealing with the military stress the need to maintain military uniqueness in spite of the pressures for

change and adaptation (see for instance, Boëne, 1990; Dandeker, 2001b). When compared with the civilian society, the military continues to be typified by numerous characteristics with a far-stretching impact on those working within it, in spite of a certain convergence with the civilian mainstream (see for instance, Booth et al., 2001: 333–334).

**Organizational characteristics and protest.** While there are many elements which make the military unique, several important characteristics have particular ramifications on whether and how personnel can engage in protest: military loyalty, bureaucracy and hierarchy, discipline and authoritarianism, unit cohesion and the unique legal position of personnel.

**Military loyalty** is one of the most important and most often mentioned military values (Coleman, 2009; Robinson, 2008). According to Winslow (1998), loyalty is instigated at all levels of the military organization as it supports its crucial collective goals.

At the level of the military organization as a whole, Heineken (2006) describes loyalty as a reciprocal relationship where government serves as a guardian of the personnel's interest while personnel trust their employers and need no independent representation to fight for their interests. More often, loyalty concerns the lower level of operational units. Connor (2007: 71–72) argues that 'it is a truism that small groups of soldiers fight for each other first, and higher ideals second'. Connor (2007: 69) also sees striking similarities between this kind of military loyalty and family loyalty and points out that military training commonly aims to place individuals within a new family. What are the consequences of such strong loyalty in situations where military personnel experience discontent?

Importantly, Coleman (2009: 111) notes that 'Given that military personnel place their lives at risk in doing their duty, and that these personnel know that in combat situations they are expected to demonstrate extreme, possibly unlimited, loyalty to their colleagues by placing their lives in each other's hands, it should hardly be surprising that these same extreme perceptions of the demands of loyalty tend to be extended to more ordinary circumstances'. Indeed, it is difficult to imagine how loyalty forged under the most difficult circumstances can suddenly be switched off once personnel return to a non-combat work environment. While in such circumstances protest might be actually acceptable as it does not hurt key military tasks, military loyalty commonly works to restrain protest, both at the organizational level (Heineken, 2009) and when dealing with wrongdoings of fellow service(wo)men (Coleman,

2009: 111). In such situations, loyalty leads personnel to defend their colleagues and organization, especially if the perceived attack is coming from the outside society (Kleinig, 2001: 10).

**Unit cohesion** has been defined as 'the bonding together of members of an organization in such a way as to sustain their will and commitment to each other, their unit and the mission' (Johns, 1984: 4). It stands closely to loyalty felt for one's nearest colleagues, also because loyalty has the most meaning within a small unit where success and survival rest on cohesion (Connor, 2007). In the military, cohesion has been hailed as a crucial value as it is deemed necessary for maintaining unit integrity, enhances performance and supports mission motivation (Siebold, 2006).

The concept, background and the role of unit cohesion were described in detail by Shils and Janowitz (1948). Their study examined cohesion and disintegration in the German Wehrmacht during the Second World War based on documents and interviews conducted with German prisoners of war. The authors' fascination was rooted in the fact that in spite of their desperate position the units in which POWs served remained surprisingly stable until the very end of the war. According to Shils and Janowitz (1948), the unit cohesion played a key role in achieving this. The study concludes that 'Where conditions were such as to allow primary group life to function smoothly, and where the primary group developed a high degree of cohesion, morale was high and resistance effective or at least very determined, regardless in the main of the political attitudes of the soldiers' (Shils and Janowitz, 1948: 314–315). Similarly to loyalty, the effectiveness rested on primary group functioning which could only be compared to one's family back home. According to Stouffer (1949), this especially mattered in combat situations, where all the primary needs of the individual are being denied.

While cohesion can prevent protest as a subversive activity which might hurt the group, cohesion can also foster protest, depending on the situation and the norm within the group. In fact, group cohesion is one of the necessary ingredients of collective action (Van Stekelenburg and Klandermans, 2013).

**Discipline and authoritarianism.** Lang (1965) stressed that discipline concerns respect for orders, acceptance of authority and punishment for unruly behaviour (see Donohue [1993] for a detailed discussion on the meaning of military discipline). Importantly, while Donohue (1993) argues that the nature of military discipline has been changing, irrespective of the way we conceive it, obedience remains one of its key elements. For the soldier at the bottom of the command chain this means that he, or

she, has 'no recourse but to obey; discipline is his primary virtue. His judgment concerns only how to overcome the external difficulties he encounters in the execution of orders' (Lang, 1965: 852).

Soeters and Recht (1998) found that even in cases where the formal discipline does not enjoy much value, informal group norms matter a lot and general military discipline alternates with self-steering through informal group norms. The consequences of this is that 'the hierarchical military environment, notwithstanding a formally rigid command structure, places a high premium on flexibility and initiative within the limits of that command structure' (Lang, 1965: 851).

Concerning protest, we can conclude that in this kind of organization, engaging in behaviour which does not correspond to general norms of behaviour is difficult. Even if the exact rules might not ban certain protest actions, informal norms of behaviour which go together with discipline might have the same suppressive result.

**Bureaucracy and hierarchy.** Ever since Weber used the Prussian military as a prototype of a bureaucracy, military organizations have been hailed for their bureaucratic model of organizational behaviour. According to Janowitz and Little (1965: 27), 'the career soldier is assumed to be an ideal example of the professional operating under bureaucratic authority'. While the bureaucratic modes of organization have changed greatly in the meantime, bureaucracy persists – 'It is difficult to imagine how soldiers would be recruited, trained, and deployed without a supportive bureaucratic apparatus' (Shields, 2003: 181).

Yet, while some might note that all modern organizations rest on a higher or lower level of bureaucratic organization, it is important to highlight the specific nature of military bureaucracy. Drawing on Adler and Borys's (1996) distinction between coercive and enabling bureaucracies, Soeters et al. (2006: 242) highlight the coercive nature of the military bureaucracy when compared to business organizations. In particular, they refer to the higher level of power distance and rule orientation found in military academies.

For those facing bureaucracy and hierarchy, there are often consequences if they want to voice complaints outside the prescribed hierarchic structure. Lang (1965: 855) wrote that the 'hierarchical command authority as a rule is highly suspicious of granting lower-level participants the right to appeal outside of regular command channels'. Chief reasons for this are the possible disruptive consequences for military discipline and effectiveness. In addition to this, Lang cites Evan (1962), who found that when there are individuals or institutions which personnel

can complain to, many have internal constraints from doing so – especially if such instances even indirectly form a part of the military hierarchy – as they still symbolize authority. At the same time, Lang (1965) maintains, those forming the instances where personnel can complain, if a part of the military hierarchy themselves, will not readily take necessary action, in order to avoid endangering the organization which is ultimately important for their own position.

**Legal position and restrictions regarding protest.** In all Western democracies, military personnel enjoy a specific legal position. They are subject to various rules and regulations different from the civilian mainstream (think for instance of the military law system or separate health care arrangements). One of the recurrent elements of this specific position concerns limitations on labour rights and political behaviour. While it is not our aim to provide an extensive overview of the exact rules in different countries regarding specific activities, a rough pattern can be discerned. In general, military personnel have fewer options available than most other citizens and the options they do have tend to be less effective.

For instance, while Western democracies sometimes do allow unionization, even when it is permitted a number of limitations on specific activities tend to hollow out this right. Striking, normally a key pressure tool of trade unions, is nearly always forbidden (Hummel, 2014; Nolte and Krieger, 2003: 84). Other activities such as demonstrating or petitioning are allowed in a number of countries, but can often be applied with more restrictions than for other citizens. If we consider general political rights, the tendency is similar and the political neutrality of military personnel is highly valued although exact regulations tend to vary from extreme restrictions (such as in Spain or France) to tolerance of political activities as long as the military service is not impeded (such as in Germany or the Netherlands) (see Leigh and Born, 2008).

#### *Understanding discontent and protest in the military context: psychological contract and beyond*

While protest was never a prominent element in the literature on the military profession, the manner in which discontent is dealt with within Western military organizations has been clearly outlined. This arrangement is commonly referred to as the psychological (Bartle, 2006a) or social contract (Farley et al., 2006: 67), and in Great Britain as a segment of the military covenant (Tipping, 2008). In organizational science literature the psychological contract is a well-established concept which denotes subjective beliefs regarding an unwritten agreement about

mutual obligations between an employee and an organization (Rousseau, 1989). The literature on the military defines the specific form of psychological contract in the military organization as a two-sided arrangement. On the one hand, military personnel fulfil demanding and sometimes dangerous duties while facing cultural and legal restrictions to their political and labour rights. On the other hand, the employer protects military personnel more than is the case in common civilian organizations, by shielding them from market forces and providing for a stable socio-economic position.

Inevitably, just like in every other organization, military personnel might sometimes face a crisis or a problematic situation which causes discontent, no matter how well things are arranged. In such instances of discontent, personnel will weather the difficulties, remain loyal to their employer and refrain from protest not only because protest is difficult, but also because in the greater picture, their employer is also loyal to them and deserves reciprocal loyalty.

The transformative processes which culminated after the end of the Cold War have a direct influence on the psychological contract, chiefly by removing the stability and the guaranteed socio-economic position of military personnel but also by numerous other changes within the organization and the military profession. There are warnings that this psychological contract might collapse in numerous countries (see for instance, Bartle, 2006a), which brings forth the idea that military personnel might get more assertive, as long predicted by Moskos (1977). The question of whether and how the behaviour of personnel might change once the psychological contract is under pressure or disintegrates completely can only be answered by consulting empirical evidence, to which we turn in the next section.

#### **Empirical section: Evidence on discontent and protest in the military**

In this section we review studies which provide evidence on discontent and protest within the military. We distinguish between three major topics – studies on labour relations and unionism, studies on anti-war protest within, and studies focused on diversity issues including gender, ethnic/racial and sexual minorities.

##### *Labour relations, trade unions and protest*

Forming associations in order to protect the interests of employees was a crucial tool in the social struggles



during much of the 20th century (Streeck, 2005). The fact that military personnel in many countries did not participate in this historical development was one of the important divisions between them and the rest of the labour force. Subsequently, the issue of unionization of military personnel became a topic of interest, among both policy makers and scholars. Most research focuses on the question of whether and how the possibility of unionization was offered to military personnel, while engaging in actual union activities is addressed only occasionally.

The discussion on unionization within the military first fired up in the 1970s as an element of Moskos's notion of a switch towards an occupational model of organization within the military. A good overview of the developments and the arguments in the discussion of the 1970s can be found in the study by Mittelstadt (2011), where she describes what turned out to be the failed attempt to unionize the US military. At the time, congressional budgetary cuts and the general move towards an occupational model of organization led to calls for the unionization of military personnel. These attempts 'generated a furor. Pollsters frantically registered public opinion on the matter; Congress called hearings; Presidents Ford and then Carter weighed in immediately; and military leadership became, in the words of one observer, *hysterical*' (Mittelstadt, 2011: 29–30). Mittelstadt argues that the attempt to unionize inserted extra drama into the serious question of whether the new volunteer military is a job just like any other or still a calling. Military leadership was afraid of the consequences for discipline, readiness and national security. In the end, the proposed unionization was defeated by renewed political support for the military budgets and the benefits for military personnel and their families. In other countries, such as Canada and Great Britain, similar pushes for unionization were addressed by forming alternative bodies for dispute resolution, yet short of association.

Internationally, Harries-Jenkins (1977) argued that the push towards unionization in most cases came from the increased feeling that the military's social standing and rights have been endangered. At the same time, arguments against independent trade unions were proclaimed in many countries – largely based on the fact that the military profession is profoundly different from civilian professions, with the possible consequences of unionization including a breakdown of discipline, undermining of the military authority structure and subversion of the political control (for a detailed discussion on historical arguments against unionization of military personnel see Caforio, 2006: 314–316).

As already stipulated, after the failed, but tumultuous

attempt to unionize personnel, the United States reinforced the socio-economic position of military personnel, thereby strengthening the psychological contract and delaying the effects of the organizational model. However, when the Cold War was ending, in many other countries the strategic incentives to invest in such arrangements disappeared.

Bartle and Heineken's (2006) comparative volume on military unionism in the West highlights a distinction between three groups of countries. Countries like France, Italy and Spain forbid military personnel to join or form military unions – their interests are protected by the commanding officer or state itself. In countries such as Slovenia, South Africa and Ireland, military trade unions have been introduced in recent decades. In countries such as the Netherlands, Germany and Sweden, military unions have been allowed for a longer period of time. In general, the role of the unions is to bargain with the employer, but, as in the Dutch case, they sometimes also protect the individual interests of the employees. The key message of Bartle and Heineken's (2006) volume is that regardless of the status of unionization, the situation of military personnel seems to be similar across the Western world, and can best be described as precarious, both in terms of socio-economic pressures as well as the lack of a clear route to deal with these pressures.

The similarities in pressures but also the increased internationalization are mirrored in the activities of the European organization of military associations, EUROMIL, which aims to support the social rights of soldiers at the European level but also pressure governments to 'to lift all existing restrictions rights of soldiers which are not an inevitably and proportionate result from the military assignment' (EUROMIL, 2017).

On the individual level, Heineken's (2009: 493–494) international comparative study among middle-ranking officers found that the introduction of business-like practices in order to improve efficiency, cost-effectiveness and flexibility changed the way officers see their profession and the relationship with their employer. Heineken concludes that these reforms undermined the traditional values which included selfless service, loyalty and commitment. In addition to that, changes caused officers to stop trusting military leadership when it comes to defending officers' interests. This in turn led military personnel to consider other possibilities when it comes to influencing their position, for instance unionization in situations where this was previously not the case, but also to consider other forms of applying pressure. Still this is more of a prediction than reality as there is very little evidence for increased

activism. In France, for instance, the military is commonly known as *Le Grande Muette* ('the big silent one'). Officers are not supposed to engage in politics and the civil domain has a clear dominance over the military one (Cogan, 2003: 158). In the 1950s and early 1960s this changed – the French army went from obedience to mutiny, but in the period afterwards the silent and obedient position of the French armed forces was restored and lasts to the present day.

Similar patterns are present in other countries – military personnel rarely resort to protest. Some authors however take a more normative turn and argue that the time might be ripe to break this pattern. In Great Britain, Strachan (2003) proposes increased politicization in order to strengthen the position of the military personnel versus the political leadership. Strachan sees the need to breach the mode of silence which, especially in a media-driven world, leads to servicemen and women being unable to express their views. He questions the depoliticized manners of the servicemen and women and points out that, historically, issues which endangered professional interests used to be addressed by briefing the press and blackmailing politicians (Strachan, 2003: 54–55). In the US, Sarkesian (1998: 425) made a similar argument and cited General Ridgeway, who proclaimed that no military leader should forget that he or she is a citizen first and soldier second, meaning that he or she has a duty to warn politicians and the people of problems they see. The years of austerity and the introduction of flexible and short-term contracts in Europe might have produced the effect of increased politicization – with street demonstrations of military personnel and military retirees occurring in Greece, Spain, Germany and the Netherlands (see EUROMIL, 2015, 2016).

Yet, the existing empirical evidence shows that military personnel remain largely passive when it comes to defending their labour rights. Even when unionization is allowed, the typical ways of fighting for labour issues remain out of reach for military personnel in most Western democracies.

### *Anti-war protest in the military*

Historically, combat refusal is probably the most common expression of dissent within the military. Recently, collective refusals to engage in combat were often closely related to broader social movements which agitated against war in various Western countries.

Kriner and Shen (2010) found that military casualties in the United States lead to drop of support for military operations, particularly within the groups which have felt the costs of war directly. However, these costs are often felt in disadvantaged communi-

ties with fewer political assets and less leverage. Levy (2013) draws on Hirschman's (1970) thesis that voice is more likely when exit is not an option, such as when conscription is obligatory. Levy (2013) compares two anti-war mothers movements – an American and an Israeli one – and argues that even though the Israeli movement faced a situation which was, compared to the American situation, 'less convenient in terms of opportunity structure and the politics of war, the recruitment-related variables tipped the scale. Due to these variables, the movement could rely on middle-class resources and power, favor voice over exit, and, mainly, perfect the framing of republican motherhood and adhere to it in a manner that was instrumental in mobilizing support. An initial social-base supportive of this protest constrained the movement to keep its relatively mainstream tone, thanks to which it became very effective' (Levy, 2013: 37).

In the United States, memories are still alive of the massive protest activities by conscripted soldiers during the Vietnam War (see Cortright and Zinn, 2013; Foley, 2003; Moser, 1996). Nowadays, there is no draft, and even though a direct comparison is difficult it seems that the protest activities within the military are less common than during the Vietnam War. Yet, protest does occur, as seen in the testimonies provided first hand by both families (Leitz, 2014) and military personnel themselves (Gutmann, 2010; Levinson, 2014).

In sum, the evidence shows that the removal of conscription might have made protest more difficult. Yet, under the right circumstances protest can still appear, as seen during the unpopular Iraq War.

### *Diversity and protest*

Literature focusing on diversity occasionally touches upon the issue of protest in addition to its main focus on organizational policies and external societal pressures. Within Western militaries, diversity usually concerns three broad groups – ethno-religious (or racial) minorities, women and LGBTs (Van der Meulen and Soeters, 2007).

The earliest discussion on diversity centred on the inclusion of minority ethnic and racial groups. In the United States, the struggle for the emancipation of African Americans within the US military was embedded within the general civil rights movement and in the conflicts leading up to it and included a full repertoire of protest activities which in concert with the broader social movements led to racial integration (see Binkin, 2011; Nalty, 1989). In Europe, similar issues appeared only after the arrival of a large number of non-European immigrants after the Second World War, which raised the question of inclusion of these minorities (see Winslow et al.,

2006). However, given the specific history and legal position of these minorities, the processes seen in the US throughout the 20th century did not occur. In this case, diversity is commonly approached in terms of organizational needs rather than activism and protest.

The inclusion of women in the military organization often produced conflict. Katzenstein (1999) focused on women's movements inside the military and the church and found that military women pursue unique ways of struggling against discrimination, in particular by turning to courts and political bodies. Carreiras (2008) compares the Dutch and Portuguese situations with a focus on the problems faced by military women seeking gender integration. She identifies four strategies women apply, and finds that the strategy of *conformism* – belief that gender differences should be minimized and excessive visibility should be avoided – is most commonly employed. Other strategies, *assimilation*, adapting to the military ways and in a way beating the men at their own game, *complicity*, remaining loyal while preserving the gender differences and femininity, and *assertivity*, where women want to preserve the gender difference in an emancipatory sense by employing voice to channel their demands, are far less common. Notably, increased acceptance of women within the military has also led some men to rebel. Miller (1997) presents evidence on how men use anti-social behaviour – chiefly harassment – to protest the increased presence of women, which they perceive as threatening.

In the United States, the position of LGBTs within society was a contentious political issue for decades (Fetner, 2008). Direct protest by LGBT servicemen was long impossible, as the Don't Ask Don't Tell (DADT) policy required openly declared LGBTs to leave the organization. Eventually, external pressures and the success of the political allies of the LGBT community lead to the removal of discriminatory policies. In many other Western countries, the issue of LGBTs within the military organization was not as politicized as in the United States, issues of harassment and inclusion certainly did and continue to exist (see, for example, a qualitative study by Bullinga [1984] on the Dutch military in the conscription period). A more recent example by Richardson and Bosch (2002) shows that the activism of minority groups within the Dutch military is nowadays formalized in networks of LGBTs, women and ethnic minorities, whose activities include information days and symposia where issues are discussed and communicated to policy makers and the organization – reflective of broader societal trends. Similar networks exist in other countries as well, for example Great Britain and Australia.

In sum, we can conclude that when protest regarding diversity takes place, it is often an organization-friendly, cooperative approach. Confrontation rarely takes place and tends to be effective when external allies can support it – in particular policy makers and general public opinion.

## Assessment of research to date

Literature on behaviour within organizations stresses that remaining passive is the most common response to discontent among employees (see Kolarska and Aldrich, 1980). Unsurprisingly, the same can be said of the military, which is famously hostile towards contentious behaviour. Our review shows that while protest is not completely absent within the military, it remains an exceptional form of behaviour.

There is a large consensus in the literature that the arrangement governing the position of military personnel has been threatened by the numerous changes in the military organization. Looking at the consequences of these changes, some authors hypothesized that both socio-economic pressures and the increasing convergence with the civilian mainstream might cause more activism among military personnel (Heineken, 2009; Moskos, 1977). The empirical evidence does not unequivocally confirm such a trend, however. Certainly, there is some evidence of growing dissatisfaction and also of more opportunities to express that dissatisfaction. For example, in recent decades more countries have begun to allow trade unions for military personnel. Still, collective protest as a form of behaviour among military personnel remains rare. In fact, there is evidence that the changes within the military organization might have suppressed protest rather than encouraged it, as seen in the removal of conscription and the subsequent decrease of contact with the more rebellious segments of the general population. Moreover, the changes which make protest easier should not be overstated – both legal limitations and unique cultural traits specific for the military persist, especially regarding behaviour which could endanger key military tasks: take for example the limitations on striking, normally a crucial tool in civilian labour relations, which remain firmly in place in almost every Western democracy.

When protest behaviour does take place, it often concerns the issues of diversity and to some extent the anti-war movements – probably because these issues figure prominently in public debate within the civilian society. The forms of protest which are applied usually suit the specific organizational setting of the military. However, the developments outside the organization matter as well. Studies which

investigated the instances of activism within the military highlight the importance of external allies which can assert influence on policy makers. Such allies are able to inject their resources and have experience with similar issues in other settings, thereby aiding those within the military. Notably, not much has been written about the relationship between military trade unions and the civilian labour movement, nor about the support for the position of military personnel by the labour movement. The lack of such a relationship might be a part of the explanation for the relative passivity when it comes to socio-economic issues within the military. At the same time, the protests which occurred in recent years in Europe are yet to be addressed by the literature.

In sum, the existing literature enables us to understand the organizational context of the military and the ways it might suppress protest. We also have a fairly good picture of the salient issues among personnel and the way they are addressed. Yet, based on the current state of research, the most important conclusion about protest within the military concerns the things we do not know. This knowledge gap can be summarized in two main points: the lack of empirical research and the missing link between military-specific research and the mainstream sociological and organizational science literature.

### *The lack of empirical research*

While the literature largely agrees on the nature of pressures faced by military personnel and some empirical evidence has been presented about the discontent among them, a number of crucial issues remain unresolved – chiefly because they haven't been researched properly.

To begin with, no real evidence has been presented on how specific aspects of the organizational changes influence discontent among personnel and their relationship with the employer. While Moskos et al. (2000) stress that the transformation of the military organization varies greatly between different countries and even within the same military organizations, there is very little evidence on how this transformational diversity relates to work satisfaction. While one could argue that downsizing and austerity as a rule produce discontent, we must wonder about the impact of other, less material aspects of the transformation of the military organization. As such changes might place traditional military norms under pressure, the question is whether this could have unintended consequences and indeed lead towards more non-traditional behaviour. Regrettably, if we focus on the reaction of military personnel when under pressure, particularly in terms of protest, we face an even bigger lacuna. While the turn towards trade unions has been a hypothesized

result of the transformation of the military and we indeed know a bit about trade unions within the military organization, evidence on the opinions of personnel about unionization, membership rates and readiness to engage in union-related activities is non-existent or difficult to find. Subsequently, protest behaviour, in the case of labour conflicts usually organized by trade unions, remains under-researched as well.

### *The lack of a link to findings from other fields*

The second major problem concerns the lack of a connection between the existing research on protest-related issues within the military and the literature on similar topics within other types of organizations and spheres of life. While this isolation can partially be attributed to mainstream academia which nowadays commonly ignores the military organization (Malešević, 2010; Zürcher, 2013), our review shows that military sociologists do not invest enough effort into understanding how the developments within the military relate to trends described in other sectors.

For example, ever since the 1970s military-specific literature has focused on the increased interest in trade unions by military personnel. At the same time, we know that trade unions in other sectors are going through a difficult period with severe consequences on their ability to attract membership as well as influence policy makers (Streeck, 2005). No attempt has been made to relate this profound crisis to developments within the military and the attempts to spread unionization among military personnel. Subsequently, questions on whether military trade unions are an exception or whether they will follow suit of other sectors remain unresolved.

More broadly, issues such as discontent, protest and trade unions are rarely observed in comparison to other organizations where personnel face similar constraints, such as the police or medical services. Besides sharing a number of aspects of their organizational culture (Soeters et al., 2006), military organizations in the Western world face pressures such as austerity and increased focus on efficiency, which are in fact typical for many other public institutions. Failure to observe military personnel in comparison to other (public) employees results in a profound lack of understanding of not only the effects of the developments within the military on the behaviour of personnel but also the effects of the specific organizational characteristics when facing these developments.



## Future research

In this final section we aim to address the two limitations in our knowledge on protest within the military – the lack of empirical research and the lack of a link to the findings and developments in other spheres of life. We see the need to investigate specific and urgent questions and propose a path to do so by leaning on both the existing knowledge on military affairs and abundant research from outside the military.

### *A framework for research on protest within the military organization*

Empirical evidence shows that, within the military, protest is rare. When it does occur its form is often adapted to the specific organizational circumstances. Hence, it makes sense to observe collective protest as only one of the possible strategies when coping with discontent, especially since a similar approach is commonly applied when studying activism in the wider society. Wright et al. (1990) noted that disgruntled citizens at first have a choice between remaining passive or engaging in some kind of action. When they engage in action, they can do that individually or collectively. Collective action itself can be normative and take place within the norm of the law (for example taking part in a legal demonstration) or non-normative (for example illegal protest). Evidence shows that in the civilian world the choice to protest is made only occasionally, as other reactions, such as remaining passive, are more prevalent (Marwell and Oliver, 1993). This has been recognized within organizational settings where studies commonly apply the framework which has been proposed by Hirschman (1970) and later expanded on in numerous empirical studies on employee behaviour. Hirschman (1970) identified two key sorts of behavioural strategies, *voice* – communicating the need for change – and *exit* – leaving the problematic situation altogether. Importantly, while not the direct focus of this article, exit is an option which is routinely and extensively investigated within the military organization – chiefly because it has enormous impact on its functioning. The choice between exit and voice can be influenced by loyalty – the feeling of commitment which can provide for the readiness to endure the problematic situation and stick with the organization – but also by a great number of other demographic and personal variables. Later, more refined applications of Hirschman's framework commonly included behaviour defined as *silence* – 'the intentional, conscious decision of employees to withhold their opinions and concerns about organizational circumstances' (Bell et al., 2011: 135) – but also *neglect*, which refers to anti-organizational or anti-social behaviour

such as investing less effort into work or causing damage to the employer (Farrell, 1983). Importantly, neglect can also refer to bullying, which was in fact identified as a form of protest by military personnel in a study by Miller (1997).

Applying Hirschman's framework and its more recent variations within the military setting might be useful as it could provide us with a better understanding of the behaviour of military personnel and allow for a meaningful comparison with studies from numerous other fields of life. In addition to the usual factors which influence individuals' behaviour, such as demography and personal experiences, special attention should be given to understanding how specific elements of the military context influence the decision whether and how to engage in protest or other types of behaviour. It is often mentioned that the military context is a protest-unfriendly environment but we do not know much about how different elements of this environment work to suppress protest and in which ways they could influence alternative forms of behaviour such as exit or neglect. For example, cohesion is a typically military characteristic which can work to prevent protest but is at the same time also its necessary ingredient. A better understanding of this and similar issues has in fact value which extends far beyond military-specific studies.

Regrettably, insights from the military organization are often overlooked. From the 1970s on, the classical focus on the military has all but disappeared and the military as organization has been neglected by mainstream sociologists (Malešević, 2010). While the military organization itself could always count on sustained policy-driven research on its effectiveness and deployment (Haltiner and Kümmel, 2009: 75), military personnel's welfare was rarely a subject of academic research. For example, labour force research routinely omitted military personnel, based on the argument that they form an institutionalized population, subject to different constraints and choices than other employees (Booth and Segal, 2005). That is a pity, as, even today, many other organizations share at least some of the typical military aspects such as discipline, high cohesion or specific legal restrictions. Think of the police force, the ambulance service, fire fighters but also of other professions with a strong professional culture and feeling of separateness. Shedding more light on the issue of protest within the military might be a valuable contribution towards understanding why some groups of citizens face difficulties expressing their discontent in an effective way. Furthermore, while changes in the military organization might be having unique consequences because of the specific position of

military personnel, understanding and comparing them to similar developments, especially in the public sector, might provide us with a better understanding of how different segments of the public sector in Western democracies are transforming themselves. Finally, while the military organization has been under pressure, Western societies tend to ask more and more of their military personnel – making the mission to understand their position important for both their welfare as well as our own security.

## Annotated further reading

The following article and two books offer insights on the processes of change within military organizations:

- Moskos CC (1977) From institution to occupation: Trends in military organization. *Armed Forces and Society* 4(1): 41–50.
- Farrell T and Terriff T (2002) *The Sources of Military Change: Culture, Politics, Technology*. London: Lynne Rienner.
- Moskos CC, Williams JA and Segal DR (2000) *The Postmodern Military: Armed Forces after the Cold War*. Oxford: Oxford University Press on Demand.

The following book and article provide a good overview on trade unionism within military organizations:

- Bartle R and Heinecken L (eds) (2006) *Military Unionism in the Post Cold War Era*. Abingdon: Routledge.
- Mittelstadt J (2011) ‘The army is a service, not a job’: Unionization, employment, and the meaning of military service in the late-twentieth century United States. *International Labor and Working-Class History* 80(1): 29–52.

The following two articles and book are suggested reading on discontent and protest within military organizations:

- Heinecken L (2009) Discontent within the ranks? Officers’ attitudes toward military employment and representation – a four-country comparative study. *Armed Forces and Society* 35(3): 477–500.
- Levy Y (2013) How military recruitment affects collective action and its outcomes. *International Studies Quarterly* 57(1): 28–40.
- Levinson N (2014) *War is Not a Game: The New Antiwar Soldiers and the Movement They Built*. New Brunswick, NJ: Rutgers University Press.

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**résumé** Bien que les manifestations au sein des armées occidentales soient rares, cela ne veut pas dire que le personnel militaire n'éprouve pas du mécontentement. La transformation des organisations militaires depuis la fin de la guerre froide a poussé le personnel militaire à faire face à un certain nombre de pressions socio-économiques. Malgré ces pressions, le personnel militaire évolue dans un environnement de travail particulier rendant leur cas particulier. En effet, la culture au sein des organisations militaires et leur cadre légal rendent les manifestations plus difficiles à réaliser que dans d'autres milieux. Dans ce travail de recherche, nous intégrons les littératures sur la transformation des armées occidentales et sur l'environnement particulier des organisations militaires avec des données empiriques de cas de manifestations parmi le personnel militaire. En faisant un bilan de la recherche existante, nous identifions plusieurs lacunes et proposons un cadre pour analyser les manifestations au sein des armées occidentales.

**mots-clés** austérité ♦ organisations militaires ♦ protestation ♦ réclamations ♦ syndicats

**resumen** Aunque recurrir a la protesta no es frecuente por parte del personal militar de las democracias occidentales, esto no implica la ausencia de malestar o descontento. Especialmente, a partir de la intensificación de las presiones socioeconómicas y las transformaciones sufridas por la organización militar como consecuencia de la Guerra Fría. Cuando se enfrentan a estos retos, el personal militar opera dentro de un contexto concreto en el que una cultura militar única y un marco legal específico a menudo hacen que la participación en la protesta sea más difícil que en otros sectores sociales. Esta investigación integra la literatura basada en la transformación del personal militar occidental a través de un contexto único de organización militar y mediante evidencias empíricas de protestas en el sector. De esta forma, se evalúan las evidencias observadas hasta el momento, se identifican las limitaciones de la investigación para, finalmente, proponer un marco de estudio para la investigación de las protestas del personal militar en democracias occidentales.

**palabras clave** austeridad ♦ organización militar ♦ protesta ♦ quejas ♦ sindicatos